

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Transportation Planner	OFFICE/BRANCH/SECTION Advance Planning	
WORKING TITLE PID Program Planner	POSITION NUMBER 904-157-4768-	EFFECTIVE DATE 06/01/2015

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

GENERAL STATEMENT:

Under the general direction of the PID Coordination Branch Chief (Senior Transportation Engineer) in the Office of Advance Planning (OAP). The incumbent will assist with the preparation of the Project Initiation Document (PID) work plan; in coordination with System and Regional Planning, will assist with the management of feasibility studies and prepare feasibility studies that are not already assigned to the Systems and Regional Planning Office. Prepare the Corridor and System Coordination section of PIDs and assist the PID Coordination Branch Chief in the resolution of allocation or resource expenditure issues.

TYPICAL DUTIES:

Percentage Essential (E)/Marginal (M) ¹	Job Description
45% E	The incumbent is responsible for assisting with investigating, identifying, evaluating, updating, and summarizing the District 4 Project Initiation Document (PID) work plan, allocations and expenditures from various program sources available to the District Office of Advance Planning.
30% E	In coordination with System and Regional Planning, assist with the management of feasibility studies. Based on priority corridor needs and Planning emphasis areas developed during the System Planning process and in partnership with local and regional agencies, the incumbent seeks input from internal functional units and external stakeholders. Prepare feasibility studies that are not already assigned to the Offices of System and Regional Planning. Perform contract management duties.
15% E	The incumbent will prepare the Corridor and System Coordination section of PIDs as requested by the Senior Transportation Engineer.
10% M	The incumbent will assist the PID Coordination Branch Chief in the resolution of any allocation or resource expenditure issues with the HQ Office of Program and Project Planning.

¹ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.

MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

This position will not have supervisory responsibility.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

In addition to a general knowledge of the District, the Department and its' programs, the incumbent must be willing to learn to identify the different types of Caltrans programs and projects and recognize the basic planning and engineering terminology used.

The incumbent should have the ability to analyze new technical and general policies, assess their impact to existing procedures and to implement the required changes. The incumbent must be able to read, comprehend and apply reference materials to the job, which may include Deputy Directives, Accounting Manuals, pre-programming and programming documents, the Workplan Standards Guide, and the Project Development Procedures Manual. The incumbent must be able to read, comprehend and apply transportation plans generated from other District Planning offices to their job. The incumbent must have the ability to communicate effectively verbally and in writing in both engineering and financial circles; be able to coordinate action between the Office of Advance Planning and representatives from other functional units as well as external agencies, and assist in the resolution of conflicts between all parties in regard to project resource allocation.

Must have strong analytical abilities and attention to detail are necessary. Must be able to understand, extract, and compile financial data from a variety of sources, be able to recognize relevant content of various types of Caltrans projects and apply appropriate Departmental criteria to maintain proper budget authority.

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Must have familiarity with personal computers and must be willing to learn and work with new computer software and databases applicable to the job duties which may include, but is not limited to knowledge of E-FIS, Datalink, PRSM, and Microsoft Office applications, especially with Microsoft Excel and Word.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent will provide recommendations to the Office and Branch Chiefs in Advance Planning regarding the expenditure status of projects on the PID annual work plan. Consequences of inadequate judgment could result in extensive project delays, increased costs and/or penalties. Errors in preparation and research can cause misspent or inadequate use of available funds, create distortions and errors in the accounting systems, generate misleading and incorrect financial reports to management and result in PID work plan failure. Because of the many required contacts described above, the incumbent's actions must reflect a sensitive and professional attitude in order to maintain an appropriate State image.

PUBLIC AND INTERNAL CONTACTS

Under direction of the Senior Transportation Engineer or the Supervising Transportation Engineer, the incumbent will work closely with the Division of Project Management, the Division of Administration, and the Division of Design, as well as the offices within the Division of Transportation Planning and Local Assistance and Headquarter Program and Project Planning. As required, the incumbent will work with other district offices, branches and headquarters functions concerned with office business. In addition, it may be necessary to interact with various governmental agencies, private industry, and other public members.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Physical: Employees may be required to sit for long periods of time using a keyboard and video display terminal. Ability to work on a keyboard; manual dexterity; sitting for long periods; develop and maintain cooperative relationships; ability to focus for long periods of time.

Mental: Must grasp the essence of new information and master new technical and business knowledge. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Must be able to organize and prioritize large volumes of varied documents. Employees must be able to concentrate in order to review and create documents and meet strict deadlines at times.

Emotional: Most of the jobs in the Division require interaction with many people. It is important that employees work with others in a cooperative manner. Must deal effectively with pressure, maintain focus, and intensity yet remain optimistic and persistent, even under adversity. Must be able to develop and maintain cooperative working relationships. Considering and responding appropriately to the needs, feelings, and capabilities of different people in different situations; is tactful and treats others with respect. Is open to change and new information; adapts behavior and work methods in response to new information, changing conditions, or unexpected obstacles. Adjust rapidly to new situations warranting attention and resolution. Behaves in a fair and ethical manner toward others and demonstrates a sense of responsibility and commitment to public service. Values cultural diversity and other individual differences in the workforce.

WORK ENVIRONMENT

While at their base of operation, employees will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. Employee will work in workstations within cubicles. Working hours will be set sometime between 6:00 a.m. and 6:00 p.m. Overtime is not anticipated, but vacations may be restricted, during peak times and fiscal year-end closing. Employees may be required to travel in state, but the travel it is not very frequent.

I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

EMPLOYEE (Print)

EMPLOYEE (Signature)

DATE

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I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE
